# Teaching with Cases

## What is a Case?

Cases are narratives, situations, scenarios, selected data samplings, or statements that present unresolved, challenging and provocative issues. As a teaching/learning tool, cases challenge students to analyze, critique, make judgments, speculate and express reasoned opinions. Above all, although information can be real or invented, a case must be realistic and believable. The information included must be rich enough to make the situation credible, but not so complete as to close off discussion or exploration. They may include information that is not directly relevant to the question at hand, thereby giving students the chance to sort through information or data to decide what is most relevant. They usually also exclude some information that is relevant to the question, forcing the students to fill in the missing areas with their own knowledge, assumptions or research. A well-structured case will ask students to do both of these things: distinguish between relevant and irrelevant information, and bring their own knowledge and assumptions to the table.

Cases can be short (one paragraph, a graph, a brief list of data) for short classroom or workshop discussions, or long and elaborate for semester-long projects. Cases are important for bringing real world problems into a classroom or a workshop—they ensure active participation and may lead to innovative solutions to problems.

### Formats for cases include:

* *“Finished” cases based on a full set of facts*—for analysis and prediction. Since the solution is indicated or alternate solutions are already suggested within the case itself, these kinds of cases are best for exploring what could have been done differently than what actually happened. It is important not to ask factual questions when using a ‘finished’ case, since asking such questions lowers the level of thinking to mere recall or looking up the information. Predicting what should come next, or asking students to develop alternate strategies to the ones depicted in the case will lead to higher level thinking. Note that, if you already have a ‘finished’ case, it is easy to delete the final solutions that were implemented, so that students can solve the problem on their own. In this way, a ‘finished’ case can easily become ‘unfinished’ or open-ended.
* *“Unfinished” open-ended cases,* where the results are not yet clear (either because the case has not come to a factual conclusion in real life, or because the instructor has eliminated the final facts.) Students should be asked to predict what actually happened, or make choices and suggestions that will affect the ultimate outcome of the scenario.
* *Fictional cases* entirely written by the instructor—can be open-ended or “finished”. Cautionary note: the case must be both complex enough to mimic reality, yet not have so many “red herrings” as to obscure the goal of the exercise.
* *Original documents*—news articles, exerpts from historical writings, artifacts, literary passages, video and audio recordings, ethnographies, etc., that are used for analysis. With the right questions, these can become problem-solving opportunities. Comparison between two original documents related to the same topic or theme is a strong strategy for encouraging both analysis and synthesis. Comparing two objects provides the opportunity to present more than one side of an argument; can make any inherent conflicts more complex; makes it possible to explore alternate strategies or solutions to a problem; and can generate a higher level understanding of an overarching concept.

### How do I manage a workshop or classroom around a case?

* Design discussions for small groups: 3-6 students is an ideal group size for setting up a discussion on a case.
* Design the narrative or situation such that it requires participants to reach a *judgment* and a *decision*. If possible, require each group to reach a *consensus* on the decision requested.
* Structure the discussion. The instructor should provide a series of written questions to guide small group discussion. Pay careful attention to the sequencing of the questions. Early questions might ask participants to make observations about the facts of the case. Later questions could ask for comparisons, contrasts, and analyses of competing observations or hypotheses. Final questions might ask students to take a position on the matter. The purpose of these questions is to stimulate, guide or prod (but not dictate) participants’ observations and analyses. The questions should be impossible to answer with a simple yes or no, or by finding the answer online.
* Debrief the discussion to compare group responses. Help the whole class interpret and understand the implications of their solutions by asking each group how it came to its conclusion, and actively comparing and evaluating different conclusions or solutions as the discussion unfolds.
* Allow groups to work without instructor interference while they are coming to their conclusions. Allow all answers equal weight in the first report out, so that the discussion itself can examine the relative merits of each answer. When the instructor gives any indication that one answer is better than others before having had a fulsome discussion about all the answers, he or she has shut down a valuable opportunity for peer to peer feedback and critical thinking. Instructors using cases must be comfortable with ambiguity and with the non-traditional roles of witness and resource, rather than authority.

### What questions should I consider for a case?

Cases can be more or less “directed” by the kinds of questions asked—these kinds of questions can be appended to any case, or could be a handout for participants unfamiliar with case studies on how to approach one.

* What is the situation—what do you actually *know* about it from reading the case? What don’t you know? (*Distinguishes between fact and assumptions…critical understanding*)
* What issues are at stake? *(Opportunity for linking to theoretical readings)*
* What questions do you have—what information do you still need? Where/how could you find it? (*Opportunity for students to do additional research*.)
* What are the problem(s) that need to be solved? *(Opportunity to discuss gaps between assumptions, sides of the argument)*
* What are all the possible options? What are the pros/cons of each option? What would happen if…?
* What are the underlying assumptions for [person X] in the case—where do you see them?
* What criteria should you use when choosing an option? What does that mean about *your* assumptions?

### How do I handle diversity of opinion and help to make disagreements productive?

* **Delay the problem-solving** part until the rest of the discussion has had time to develop.
* **Shift points of view**: “Now that we’ve seen it from Bill’s standpoint, what’s happening here from Sandra’s standpoint? What evidence would support Sandra’s position?” “Is there a middle way between the two positions?”
* **Shift levels of abstraction**: if the answers to your questions are vague, as in something like “It’s just a bad situation”, quotations help: ‘When [person X in the case] says “\_\_\_\_\_”, what are her assumptions?’ Or seek more concrete explanations: ‘Why does she hold this point of view?’
* **Ask for** **benefits/disadvantages** of a position, outcome or solution; for all sides.
* **Shift time frame**—to “what’s next” and/or to “what if”—‘how could this situation have been handled differently? What could have been done earlier to head off this conflict and turn it into a productive solution? Is it too late to fix this? What are possible leverage points for a more productive solution? What good could come of the existing situation?’ Such questions can also be asked of a set of data: ‘If you changed X variable, how would this have changed the outcome? Why? How would that advance us in the understanding of Z? What other variables could be changed, and what would be the result? If we did nothing, what would happen next?’
* **Shift to another context**: We see how a person who thinks X would see the situation. How would a person who thinks Y see it? We see what happened in the Johannesburg news, how could this be handled in [your town/province]? How might [insert person, organization] address this problem?
* **Facilitate with follow-up questions**: ‘what do you mean by\_\_\_?’ Or ‘could you clarify what you said about\_\_\_?’ (even if it was a pretty clear statement…allows time for thinking, developing different views, exploration in more depth) Or ‘how would you square that observation with what [name of person] pointed out?’
* Point up and ***acknowledge differences*** in discussion—‘that’s an interesting difference from what Sam just said, Sarah. Let’s look at where the differences lie…’ (let the sides clarify their points before moving on).